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ABSTRACT

Long-range planning is discussed in relation to certain critical inputs, factors giving planning the impetus to respond, and developments for the future based on fundamental changes in alumni affairs. Critical inputs which reinforce a continuing and orderly process of directing change include: (1) a recognition of the changing nature, emerging needs and demands of the external environment which the school is supposed to serve; (2) the present role and status of the institution, including a searching examination of goals; and (3) institutional research into various facets of university environment and learning. In an effort to enable the whole process of long-range planning to succeed, it is necessary to: (1) create a special organization for planning that is professionally staffed; (2) focus upon the learner and not the teacher; (3) orient the institution-wide college family to the good of the whole school; (4) emphasize the process of planning; and (5) continue the capability and requirement for review and evaluation of goals, plans, and the planning process. The role of the Office of Alumni Relations will necessarily change in an effort to know how well the school is doing by its graduates and gathering that data will be a major portion of the alumni officer's work in the future. (Author/MJM)

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# LONG-RANGE PLANNING -- WHERE DOES IT ALL BEGIN

American Alumni Council

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The title of these remarks could almost be said to be generated by an 1899 verse by the writer and poet, Stephen Crane:

> A man said to the Universe:
>
> "Sir, I exist!"
> "However," replied the Universe,
> "the fact has not created in me
> A sense of obligation."

Apply this to your own college or university. Take from it this basic premise which is the beginning of all institutional planning:

> The universe has no rule which
> says that a college or university
> must exist.

Nor has this society. A brief check of the mortality-merger figures for American colleges and universities over the past 60 years indicates how frail is an institution's hold on existence.

And so we find our schools planning for survival. Trustees and administrators see in planning an aid to protecting their institution from pressures being brought to bear on it from a society in the midst of an almost violent transition. We all know, for example, that colleges and universities are faced with preparing themselves for the fast-approaching time when a college student or faculty member will be able to obtain information, including a print out or a television image, from a book or document in the British Museum or the Library of Congress; to observe a lecture or a laboratory demonstration anywhere on his own campus or any other campus or research institution in the world; to experience a performance or art exhibit at the Paris Salon or The National Museum in Mexico City.

More fundamental yet is the altering of educational programs to meet the student's need for fewer facts, figures and bits of knowledge that fade away into obsolescence with breathtaking speed, and their greatly increased need for more methods of work and principles of problem-solving. Today's students after all, face a future of being members of ad hoc teams of specialists or managing generalists with expertise and capability in behavioral and management sciences. The cataloging of facts will be left to computerized librarians and the historians.

This change in educational programming involves what we hear so much about today: the shift of emphasis from the teaching to the learning process. In simple terms, the faculty member will no longer present material for student acceptance so much as he will present and train students in the process of learning so that they can stay abreast of all the shifts the coming years will bring. The hope is that they will be able to adapt. Planning includes, therefore, considerations like independent study, self-directed learning, team and individual research, interdisciplinary approaches to key problems, information retrieval, machine teaching, and drug heightened learning. Frankly, from where we sit and serve as management and academic consultants to colleges and universities, we can tell you that unless all these matters are under serious review at your institutions of higher education now, you are going to face them soon or fall into the category of "institutions of lesser interest to students of the history of American civilization."

Of more particular interest to the administrators of colleges and universities -- and to their trustees -- are the consequences of these educational changes for the management of institutions; for the methods of recruiting, appointing and retaining faculty; for the design and construction of plant facilities; for the composition of the student mix; and for human and fiscal resources.

Not without serious consequences, too, is the fact that never before has the field of education so felt the awareness and awesomeness of the piercing national spotlight. Never before has the affluence of our society been greater. Never before have politicians fought to have colleges created in their neighbors' backyards...or promised so much through legislative authorizations and held back so much through

cut appropriations. Educational issues are now dignified enough for platform articles of either local or national office seekers. The day which many of us thought might never come has arrived. The day when the virtues, vitality and validity of our institutions reached the crescendo of a public relations officer's dreams. Yet just as educational administrators and managers yearn to prove the progress which ought to be here, we find ourselves proving only that higher education is in dire straits and somebody should be doing something about it. It is just this: that "doing something about it" is the second premise which begins institutional planning (you'll remember that the first is that there is no law of the universe which says a college or university must exist).

What we are talking about here, then, is institutional survival through planning. And by "planning" I mean a continuing and orderly process of directing change to:

a) understand this present society and project its trends for the future in order that institutional goals can be set down;

b) determine the total institutional needs to achieve its goals;

c) determine and obtain the resources of every kind, human, material and financial, to meet those needs; and

d) develop a systematic plan and program to convert the present into the future.

This process must take into account certain critical inputs, including:

1. The changing nature, emerging needs and demands of the external environment which the school is supposed to serve, with an estimate of trends and changes in trends, particularly in terms of the probable character and requirements of an institution's prime users -- its students;

2. The present role and status of the institution, including a searching examination of its goals (if any), their

appropriateness and the effectiveness with which they are being achieved; and

3. Institutional research into the way the institution's philosophy, its student body, faculty, curriculum, facilities, organizational structure and management, alumni, and its finances and institutional advancement program relate to its goals and reflect progress toward realizing them.

To be meaningful and have any hope of genuine effect upon the institution's on-going life, planning must include real involvement by representatives of every group that is inherently concerned, that possesses relevant input and that will share some of this responsibility for carrying out the plans. The primary burden is, of course, on the trustees. They have the awesome duty of holding the institution in trust for the next generation. Their ultimate responsibility for long-range planning is absolute and cannot be delegated.

Their administrators, the faculty, the students, and the alumni have levels of input for the planning process. Clearly, for example, the educational program's development is the responsibility of the faculty. Financial, plant and personnel management are among the tasks of the administrators. And the students themselves who are, after all, living out the educational experience which is a key part of the college or university's reason for existence -- research, scholarship and social service being others -- have some valuable, short-term data for institutional planning.

Leaving for later the question of alumni, these then, are data sources for planning. But we have seen time and time again that the whole process will not get off the ground unless it includes:

1. A special organization for planning that is professionally staffed;

2. A focus upon the learner and not the teacher.

3. An institution-wide orientation of the college or university family to the good of the whole school;

4. An emphasis upon the process of planning rather than "The Plan" at any one time or place. When this is not done the school mortgages its flexibility to meet the unexpected challenges that confront it in sequence different from the anticipated; and

5. A continuing capability and requirement for review and evaluation, first, of goals as they serve as guidelines for plans, second, of plans as they are put into action to achieve goals, and third, and very importantly, of the planning process itself to discover its weaknesses and seek its improvement.

Up to this point I have only touched on the fact that the alumni of an institution have some form of input data needed for its planning process. Now I would like to get a bit more specific. Your alumni are, after all, the products of the school's educating process. I submit that their success or failure as individuals and as elements of this society is fundamental data to a college or university's planning process. For example, a school has a long history of men and women of great importance to American literature -- like Iowa State -- or to American social and financial development -- like Harvard -- or to art and engineering -- like Cooper Union -- then it knows that at least in certain areas, and perhaps more out of luck than planning, it has been successful. But a history of third-rate preachers, low-level businessmen, and immoral politicians massed together in one alumni body could well indicate a problem in some aspect of the institution's educating process...a problem which, in these years of stress for higher education, brings down the house and locks the school's doors.

Personal success or failure is hard to judge as individuals to say nothing of judging it for whole alumni bodies. But it is being attempted now and we'll see more of it soon, I believe.

My point is this: the real work of the alumni office is not going to be the old club meetings and beer-blast dinners of the past. For that matter, we've already seen the ending of this. Nor will it be some strange amalgamation of reunion and lecture series called an alumni college. Let that go to the more academic workers of schools of continuing education. Rather, I see coming, far faster than any

of us expected, the day when an Office of Alumni Relations will have as much -- if not more -- responsibility to the institutional planners than the development and public relations people. These latter will continue to get out the facts and bring in the dollars. But the planners need to know how well the school is doing by its graduates and gathering that data is going to be a major portion of the alumni officer's work in the future. Under these circumstances, I can see the logic of looking to alumni staff for specific responsibility in the continuous academic and institutional planning process. The task of collecting data and feeding into the planning process data on alumni is dawning. You should prepare yourselves for it. The need for planning data is absolute and it will be met for both functional and philanthropic purposes.

In line with this fundamental change in alumni affairs, you can look for these developments for the future:

1. Large industries may enter into contracts for managing some marginal educational institutions.

2. Alumni, development and relations functions may be contracted just as food services and construction now are.

3. Present alumni programs will become increasingly difficult to justify unless management principles of priorities are applied.

4. The philosophy of 'serving' all alumni continuously as a responsibility of the institution for future support will diminish; it should reverse.

5. Forced programs of alumni activity will become self-supporting or obsolete.

6. Planning, resource and alumni liaison functions will be filled by academically qualified and/or business-trained executives.

I opened these remarks with a quotation from Stephen Crane which seemed, at first glance, to have little application to planning. Yet

survival is the beginning of the planning impulse, as we've seen. Now I'd like to close with some words from the great former Secretary of Health, Education and Welfare, John W. Gardner. Again, you should apply its message to your college or university.

> "Free men must set their own goals. There is no one to tell them what to do; they must do it themselves. They must be quick to apprehend the kinds of effort and performance their society needs, and they must demand that kind of effort and performance of themselves and of their fellows. They must cherish what Whitehead called 'the habitual vision of greatness.' If they have the wisdom and courage to demand much of themselves -- as individuals and as a society -- they may look forward to long continued vitality. But a free society that is passive, inert and preoccupied with its own diversions and comforts will not last long. And freedom won't save it."
>
> John Wm. Gardner